



WorldSmart CTI User guide

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Introduction

With the new WorldSmart CTI, users can have a customized Salesforce desktop that consolidates information in one place and allows them to swiftly complete their task with the fewest clicks and minimal screen refresh. WorldSmart CTI seamlessly integrates with Salesforce. After a lightweight WorldSmart CTI adapter program has been installed on a Salesforce user's machine, the Salesforce user can use the features of a CTI system from the Salesforce dashboard, which provides an intelligent SoftPhone, a customizable call control tool that appears in the sidebar of every Salesforce page.

Advantages of using WorldSmart CTI

- Unlimited portability: Turn any computer into a call center desktop
- Unlimited flexibility: Set up call centers for sales, marketing, service, or other functions
- Unlimited productivity: Connect agents to customers with a click

With new computer-telephony integration (CTI) capabilities, you can directly integrate the WorldSmart telephone network into Salesforce and access it entirely through the familiar, browser-based Salesforce interface. With the combined power of WorldSmart CTI and the new Salesforce Console, get delivered the unlimited productivity to your call centers. To use the WorldSmart CTI adapter:

1. Log in to Salesforce as a WorldSmart CTI user.
2. On the WorldSmart Messenger click on **View→Tools→Start** CTI adapter. This will initialize the WorldSmart CTI soft phone on the Salesforce window.
3. On successfully starting the adapter, a Salesforce CTI icon  will be displayed on the system tray.
4. The CTI application can be closed by right-clicking on the icon on the system tray and clicking on exit.



Features

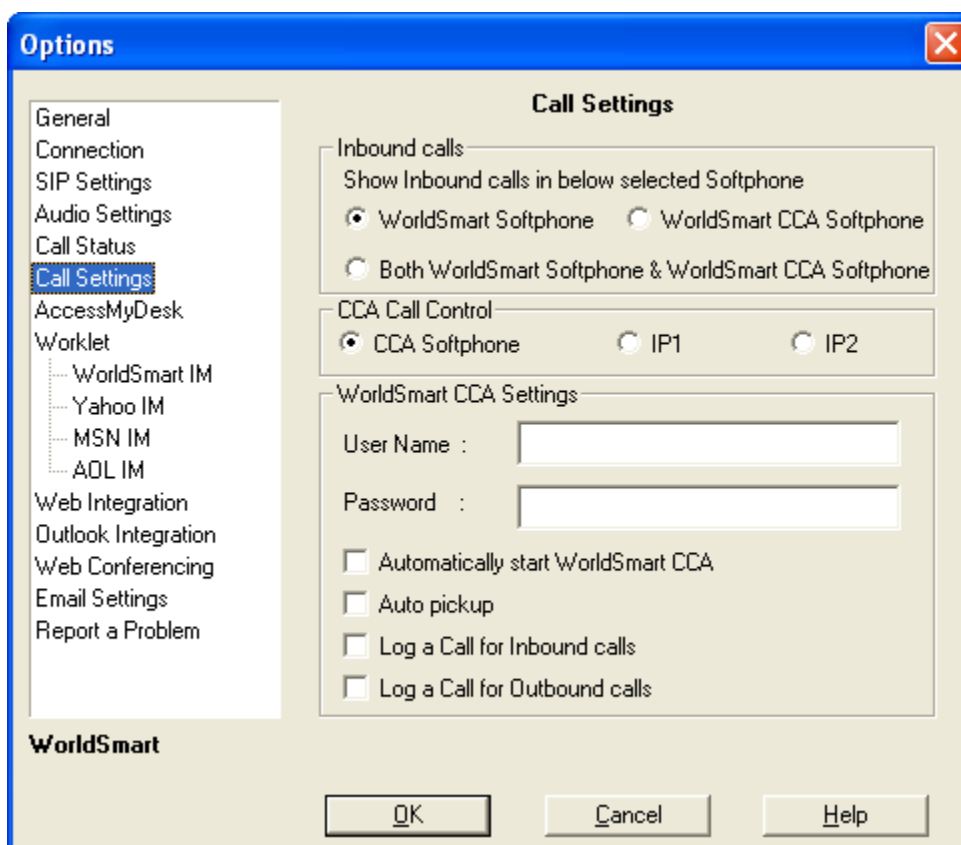
The WorldSmart CTI comes with the following features.

1. Three line interface
2. Save the Salesforce login credentials.
3. Ability to accept the incoming call on CTI or on WorldSmart Soft phone or both.
4. Third Party Call control
5. Auto Starting the WorldSmart CTI adapter.
6. Auto call pick up.
7. Log a call for inbound and outbound calls.
8. My Calls today/Last calls
9. Hold/Resume feature
10. Contact pull up
11. Call transfer
12. Conferencing

Feature Description

Save the Salesforce login credentials.

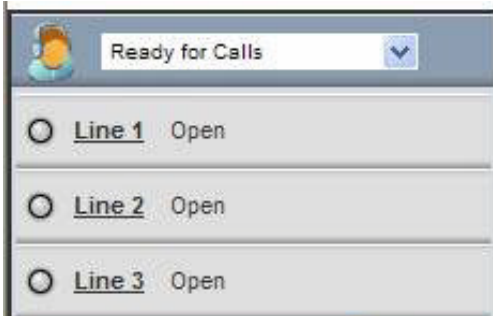
- The WorldSmart CTI application can save the user login details and automatically log in on clicking on the Start CTI adapter.
- To Save the Users Salesforce login details, On the WorldSmart Messenger click on **Tools→Options→Call Settings**.



The Salesforce login details can be saved in the user name and password fields provided under the WorldSmart CTI settings field.

Three line Interface

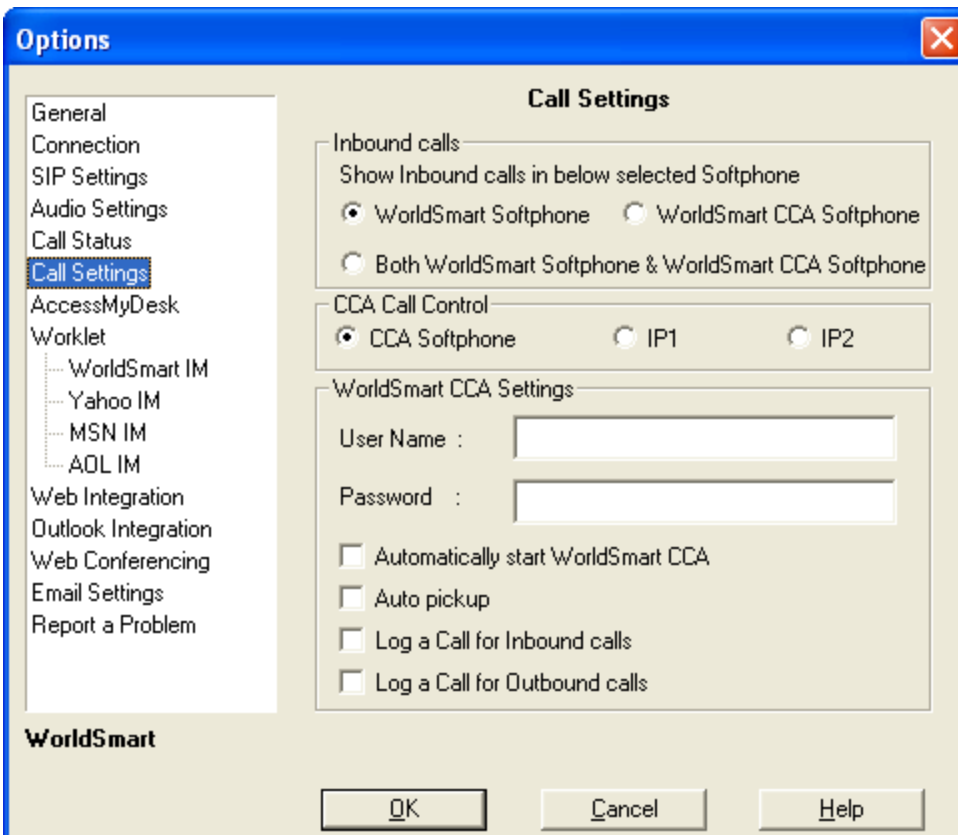
The WorldSmart CTI adapter application provides the user with a three-line interface integrated to Salesforce (Shown in the fig below) using, which the user will be to make or receive three calls simultaneously.



- Ability to accept the incoming call on CTI application, WorldSmart Soft phone, or both.
- The WorldSmart CTI adapter application gives the user the flexibility to receive the incoming call on a CTI Soft phone or the WorldSmart soft phone or both.

To control the settings, on the WorldSmart Messenger click on **Tools→Options→Call Settings**.

The settings are visible under inbound call fields and can be changes to receive the calls to any of the three options shown in the image below:





Third Party Call Control

The CTI adapter application offers flexibility for making outbound calls. The Third party Call control or the 3PCC feature gives the ability to the user to make an outbound call using the CTI soft phone, IP phone 1 and IP phone 2, depending on the users' convenience. (Settings shown in the figure above).

Users can click on the contacts on the Salesforce window and the call will be dialed out from the phone selected in the 3PCC field.

Auto Starting the CTI adapter

On checking the "Automatically Start WorldSmart CTI adapter" checkbox, the CTI application will be automatically started as soon as the user logs into WorldSmart. To log in to Salesforce the application will use the User name and Passwords saved in the WorldSmart CTI settings fields.

If there is no username and password entered, the application will open the login page for the Salesforce, asking the user to enter the user name and password.

Auto Pick up

The Auto pick up option will enable the CTI adapter application to answer an incoming call automatically to the CTI adapter.

Note: *The Auto answer will only function if there is no call active in the CTI soft phone.*

Log a call for Inbound/outbound call

Using the log a call for inbound call and log a call for outbound call options, the user will get a textbox displayed as soon as he accepts an incoming call or makes an outbound call.

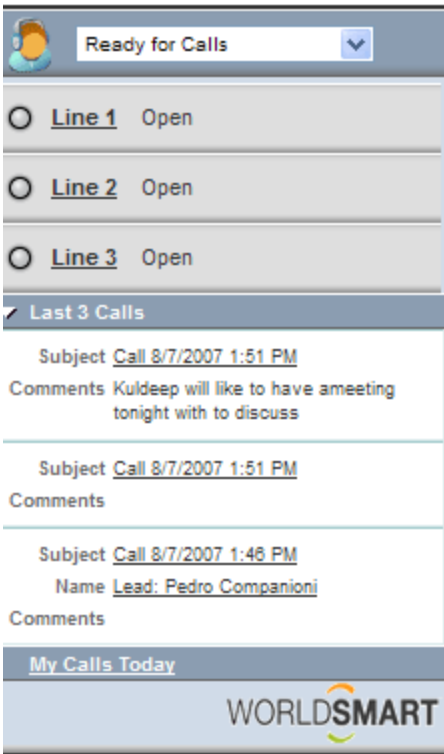
The text area shown below will be helpful to make important notes of the points discussed in the call conversation. The text entered will be auto saved as soon as the call disconnects.

The screenshot displays a call management interface. At the top, 'Line 1' is marked as 'On Call' with a green indicator. Below this, call details are shown: 'Caller ID 5105768080' and 'Duration 01:27'. A red 'End Call' button is prominent. Below it are buttons for 'Hold', 'Transfer', and 'Conference'. Underneath, 'Line 2' and 'Line 3' are shown as 'Open'. A 'Current Call Log' section is highlighted in blue, with a yellow banner stating '.log will auto-save when call ends.'. The log entry includes 'Subject Call 8/7/2007 1:51 PM', a 'Related To' field with a tooltip, and a 'Comments' text area containing the text: 'Kuldeep will like to have ameeting tonight with to discuss |'. The interface is clean and functional, designed for quick logging during a call.

Note: The text field has a limitation of 4000 characters. To be able to auto saved it the length of characters exceeds above 4200 (approximately) the system will not be able to save the text typed during the call.

My Calls today/Last Calls

The calls that were made or received for the day and the logs that the user entered while on conversation on each call can be viewed by clicking on the link My Calls today, the latest three calls will be displayed in the link with a drop down naming Last 3 calls displayed just below the three lines of the soft phone.



The screenshot shows a user interface for managing calls. At the top, there is a status bar with a user profile icon and a dropdown menu set to "Ready for Calls". Below this are three call lines, each with a radio button and the text "Line 1 Open", "Line 2 Open", and "Line 3 Open". A section titled "Last 3 Calls" is selected with a checkmark. It contains three call log entries, each with a subject line (e.g., "Subject Call 8/7/2007 1:51 PM") and a comments field (e.g., "Comments Kuldeep will like to have a meeting tonight with to discuss"). The interface concludes with a "My Calls Today" link and the "WORLD SMART" logo at the bottom.

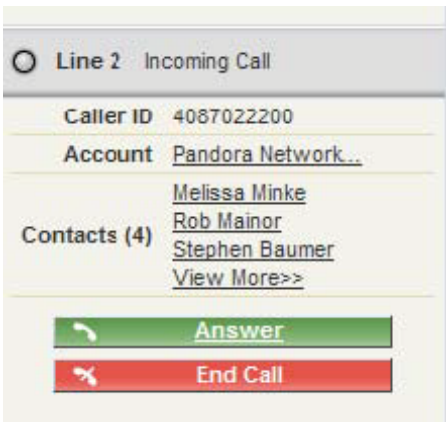
Hold/Resume

The CTI also provides the basic functionalities of a telephony system of placing the call on hold, retrieving the call back from hold.

The screenshot displays a software interface for managing calls. At the top, there is a status bar with a user icon and a dropdown menu set to "Ready for Calls". Below this, three call lines are listed: "Line 1 On Hold", "Line 2 Open", and "Line 3 Open". Each line has a radio button next to it. The "Line 1 On Hold" section is expanded, showing call details: "Caller ID 5105768080", "Duration 02:15", and "Hold Time 00:06". A prominent orange button labeled "Retrieve From Hold" with a handset icon is positioned below these details. Underneath the call lines, there is a section titled "Current Call Log" with a dropdown arrow. A yellow banner below this title reads "Log will auto-save when call ends." The log entry shows "Subject Call 8/7/2007 1:59 PM" and a "Related To" field with a placeholder text: "[To relate a record to this call, navigate to it in the main window.]". At the bottom, there is a "Comments" text area with a vertical scrollbar.

Contacts pull up

On an incoming call, the CTI adapter application matches the caller ID of the incoming calls and displays the contact that matches to the caller ID and those can be accessed just by clicking on the displayed contacts.



Transfer

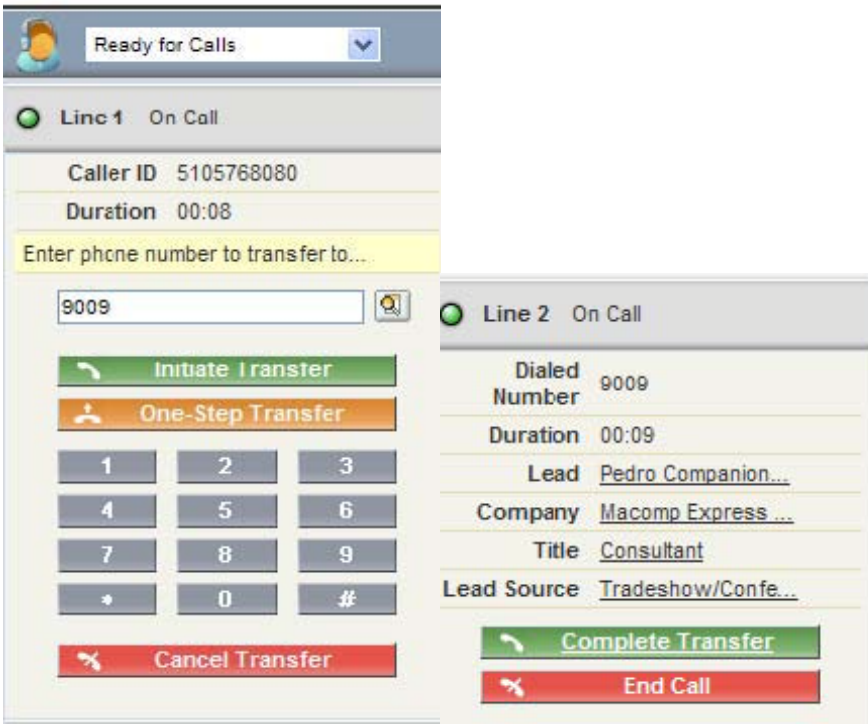
The WorldSmart CTI provides the users two transfer features:

- Attended transfer
- One step transfer

In the attended transfer, the CTI user will initiate the transfer by dialing in the person to whom the call is to be transferred and talk to the person and then complete transfer the call.

The process of initiating and completing the transfer can be done in the following:

1. On accepting an incoming call click on transfer
2. Dial in the number (See the image below on the left)
3. Click on initiate transfer (see the image below on the right)
4. After talking to the third person click on complete transfer



Conference

WorldSmart CTI adapter application supports conference calls using which the users can join a call in conference just by clicking on the conference button and dialing in the conference users extension or DID

To make conference calls using the WorldSmart CTI adapter:

1. On outbound call or an incoming call, click on the Conference button.
2. Dial in the users ext or DID.
3. Click on initiate conference. (see image below).
4. As soon as the call is answered on the other end the complete conference option appears (See the image below).
5. Click on complete conference.
6. All the three calls will be clubbed in conference.

The screenshot displays the WorldSmart CTI interface. At the top, a status bar shows 'Ready for Calls'. Below this, two call lines are active: 'Line 1 On Call' and 'Line 2 On Call'. Line 1 shows a Caller ID of 5105768080 and a duration of 00:10. Line 2 shows a dialed number of 9009, a duration of 00:10, and associated lead and company information. A central control panel allows for initiating and managing a conference call. It includes a text input field for a phone number (currently '9009'), an 'Initiate Conference' button, a numeric keypad (1-9, *, 0, #), a 'Cancel Conference' button, a 'Complete Conference' button, and an 'End Call' button.

Note:

- *More than three calls can be added in a conference using the CTI*
- *The conference calls cannot be split into separate calls*
- *To remove a call from the conference click on the End call option for the respective call it will be disconnected completely*
- *For the conference calls there will be only a single log a call window displayed*

Limitations:

1. The WorldSmart CTI does not work with the internet browsers other than IE with version 6 and above
2. WorldSmart CTI does not support the Sip dialing it only supports the digit dialing.